

| Asset Number | Name of Asset | Function | Retention Period | Is the Data Legally Required to be Kept? |
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| Civil Contingencies: Health and Safety | | | | |
| | TEN Health and Safety system | Library of risk assessments, safe systems of work and incident/accident reports | Incidents regarding accidents - 3 years from closure. Incidents regarding accidents - 25 years from closure. | Yes |
| | Accident books | Books containing reports of incidents and accidents | Incidents regarding accidents - 3 years from closure. Incidents regarding accidents - 25 years from closure. | Yes |
| | Rest centre information | Information collected to help manage an incident and may also be used afterwards to look into the handling of the incident | Information will be destroyed once the administrative used is concluded | No |
| | Disaster Recovery Suite of Plans | A suite of Plans to help SSDC recover from Disasters including technology and property | Disaster Recovery plan is kept up to date | No |
| | Out of hours service log | A log of all calls received through the out of hours helpline | Information will be destroyed once the administrative used is concluded | No |

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| | Staff Emergency Contact List | A list of officers and their contact number who may need to be contacted out of hours | Information will be destroyed once the administrative used is concluded | No |
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| Asset Number | Name of Asset | Function | Retention Period | Is the Data Legally Required to be Kept? |
|-------------------------------------|--|--|--|--|
| Community Health and Leisure | | | | |
| | Weight Loss Challenge weekly and monthly weigh in data | This information is collected from participants to monitor their weight loss during the challenge | Anonymise after two years | No |
| | Walking Football, Golden Age Olympics, Playing Out and Pop Up Sport registration and registers | This information is collected for registration purposes including medical information for health and safety purposes and to monitor attendance | Delete registration details once entered on the Balance Score Card or at the end of the project whichever is earlier | No |
| | Newsletter Contact Database | Email addresses of those who have signed up to receive the newsletter | Information about individuals will be kept as long as they want to receive the newsletter | No |
| | Junior Athletic Programme Administrative Documents | Information relating to the administration and management of the Junior Athletic Programme | Paper form destroyed once input on to Spreadsheet to be kept current year plus one | No |

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| | Holiday Activities Administrative Documents | Information relating to the administration and management of the different Holiday Activities that are organised by SSDC | Paper form destroyed once input on to Spreadsheet to be kept current year plus one | No |
| | Yeovil Recreation Facilities Booking Information | Information relating to administration and management of bookings for the Yeovil Recreation Ground facilities | Paper form to be destroyed once administrative is concluded | No |
| | Passport to Leisure Administrative Documents | Information relating to the administration and issuing on Passport to Leisure passes | Paper form destroyed once input on to database to be kept current year plus one | No |
| | Track & Key Passes Administrative Documents | Information relating to the administration and management of Track and Key Passes | Track pass - Paper form to be destroyed once input on Spreadsheet to be deleted at the end of financial year Key Record Sheet - form to be destroyed once administrative is concluded | No |
| | Finance Income Return Sheets | Information relating to the administration of the daily income received with the CHL team | Information to be retained by Cashiers for 7 years | Yes |

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|-----------------------|---------------------------------------|---|--|--|
| Communications | | | | |
| | South Somerset News Distribution list | A list of emails of individuals who have subscribed to receive the South Somerset News newsletter | List kept up to date | No |
| | Marketing photos and Video Footage | Photos and video footage taken at SSDC events for use in future marketing activities | Photos will be destroyed after 2 years | No |
| | Journalist Distribution List | A list of emails of journalists to whom we distribute press release | List kept up to date | No |
| | Copies of press releases | Copies of all the press releases which have been released by the Council | Permanent - offer to archivist | No |

| Asset Number | Name of Asset | Function | Retention Period | Is the Data Legally Required to be Kept? |
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| Countryside | | | | |

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| | Volunteer Registration Documentation and Photographs | Information regarding volunteers undertaking work on behalf of SSDC and photographs of individuals whilst volunteering | Form is updated annually and destroyed if no longer a volunteer | No |
| | Images | Pictures and video footage of individuals events held by the Countryside team for the purpose of marketing, funding bids and reporting to members | Photographs will be deleted 2 years after they have been taken and video footage will be deleted after three years | No |
| | Café till receipts | Receipts from card transactions | TBC | Yes |
| | Website | Public website used to advertise and book events including payment | Information is deleted once the event has finished | No |
| | Group booking information | Information relating to the booking and delivery of a Ranger led session | Information is destroyed at the end of each year | No |
| | Countryside sales receipts | Receipts for cash and cheque payments for Countryside sale | Destroy 6 years after last transaction in receipt book | Yes |
| | General correspondence | Correspondence from individuals including complaints, compliments and queries | Destroy 2 years after administrative use is concluded | No |

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| | Yeovil Country Park Memorial Arboretum | Information relating to the planting and management of trees in memory of deceased individuals | Permanent - Offer to Archivist | No |
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| Asset Number | Name of Asset | Function | Retention Period | Is the Data Legally Required to be Kept? |
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| Crematorium | | | | |
| | Documents relating to a cremation | Information is processed for administrative purposes in order for the cremation to be undertaken Includes application, medical certificate and particulars for cremation | Paper files destroyed after 15 years Computer records - Permanent - Information is archived for historical purposes | |
| | Cremation Register | Register detailing all cremation at the Yeovil Crematorium including details of the applicant | Permanent - Information is archived for historical purposes | |
| | Documents relating to an interment | Information is processed for administrative purposes in order for an interment to be undertaken | Paper files destroyed after 15 years Permanent - Information is archived for historical purposes | |
| | Cemetery Register | Register dating back to the 19th century detailing interments within Yeovil | Permanent - Information is archived for historical purposes | |

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| | Documents relating to memorial tablets | Information is processed for the purposes of the management and administration around memorial tablets | Destroy once administrative use is concluded | No |
| | Feedback Forms | Forms are sent out to applicant requesting feedback about the service for monitoring purposes | 1 year | No |

| Asset Number | Name of Asset | Function | Retention Period | Is the Data Legally Required to be Kept? |
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| Customers First | | | | |
| | Customer request information | Information is obtained in order to action a request for a customer for example requesting a new bin or taking a payment | Currently under review | |

| Asset Number | Name of Asset | Function | Retention Period | Is the Data Legally Required to |
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| Elections | | | | |
| | Register of Electors | Summary certification of those eligible to vote including applications for absent voting and administration of elections | Permanent - offer to archivist | Yes |
| | Election documents not available for public inspection: <ul style="list-style-type: none"> • Completed Ballot Papers • Completed corresponding number lists • Certificates of employment on duty on polling day • Nomination Papers | Record of individuals voting in an Election and other Election administration that is not available for public inspection without a Court Order | Destroy 1 year from close of poll | Yes |
| | Election documents available for public inspection: <ul style="list-style-type: none"> • Marked register of electors • Marked postal voters' list • Marked list of proxies • Marked postal proxy voters' list • Any other document relating to the election (except those not available for public inspection) | Record of those who have voted and by what means (but not their actual vote) and other general Election administration | Destroy 1 year from close of poll | Yes |
| | Declarations of result (Local elections) | Consolidated returns of votes received | Permanent - offer to archivist | No |
| | Declarations of result (Other) | Consolidated returns of votes received | Permanent - offer to archivist | No |

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| | Previous Election results | Consolidated returns of votes received | Permanent - offer to archivist | No |
| | List of Elections Staff - non-SSDC | Management of staff for elections and canvassing | Paperwork destroyed after 1 year from close of poll Electronic copies destroy after administrative use is concluded | No |
| Democratic Services | | | | |
| | Ward Member's Contact Details | Information publicly provided in relation to Ward Member's Council work including annual expenses | Destroy after administrative use is concluded | No |
| | Ward Member's Personal Information & payment of expenses | Information relating to individual development and Payroll | Destroy after administrative use is concluded | Yes |
| | Decision Making Documentation <ul style="list-style-type: none"> • Agendas • Decisions • Minutes • Executive Forward Plan | Formal record of all decisions taken by Committees, Portfolio Holders and Full Council | Permanent - held in internal archive | Yes |
| | Decision Making Documentation <ul style="list-style-type: none"> • Clerks notes of meeting | Hand written notes made to record meetings and decisions | Destroy 3 months after the confirmation of the minutes | Yes |

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| | Scrutiny Task and Finish Work | Documents and research for Task and Finish Work | Destroy after administrative use is concluded | Yes |
| | Appointment of Members to outside Organisations | Details of individual members who have been appointed to represent the Council with outside Organisations | Permanent - held in internal archive as part of Minutes of Decision that have been made | Yes |
| | The Council's Constitution | Details of the governance arrangements of the Council | Destroy after administrative use is concluded | Yes |
| | SSDC Members Register of Interest Forms including details of gifts and hospitality | Information relating to Member's disclosure of any involvement in organisations and income received from other bodies and details of any gifts or hospitality received | Destroy after administrative use is concluded | Yes |
| | Parish and Town Council Members Register of Interest Forms including details of gifts and hospitality | Information relating to Member's disclosure of any involvement in organisations and income received from other bodies and details of any gifts or hospitality received | Destroy after administrative use is concluded | Yes |
| | Complaints about Members | Information relating to complaints about Members at District, Town and Parish level | Where complaint requires a routine response destroy 2 years after administrative use is concluded Where complaint requires a detailed response destroy 6 years after administrative use is concluded | |
| | Community Governance Reviews | The administration of undertaking a CGR to consider one or more of a defined set of criteria and | Responses destroyed after responses are anonymised and collated | Yes |

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| | | implementing decisions taken by Full Council | CGR Decision Implementation Documents - Permanent | |
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| Economic Development: Yeovil Innovation Centre (YIC) | | | | |
| | YIC Tenant Files (including old tenants) | Information is held on the tenants including current and previous licences, correspondence and contact details | Signed contract - destroy 6 years after the terms of contract have expired Correspondence relating to the management of the contract - destroy 2 years after the terms of contract have expired | |
| | YIC Virtual Tenant Files (including old virtual tenants) | Information is held on the tenants including current and previous contracts, correspondence, contact details and proof of identity e.g. copy of driving licence, passport or utility bill | Signed contract - destroy 6 years after the terms of contract have expired Identity documents - destroy on the expiration of the contract terms | |
| | New Enquiry Tracker Sheet | Information such as name, email address and telephone number is collected from anyone enquiring about leasing a suite in the YIC | Personal details removed after 12 months | |

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| | YIC Financial Documents | Assists with the financial management of the YIC | 6 years | |
| | Telephone call recording system | System records all telephone calls made and received including start and end time, the number called/ called in and which business for the purpose of billing businesses for calls made and received | Currently held indefinitely | |
| Economic Development: Yeovil Innovation Centre (YIC) - Community Heritage Access Centre (CHAC) | | | | |
| | Donor Information <ul style="list-style-type: none"> • Object Record Sheet • Museum Object Entry Form • Modes System • Accession Register • Disposal File | Information is collected about items that have been donated, loaned etc and by whom they were donated and loaned | Destroy 10 years after the closure of CHAC | No |
| | Enquiry sheet | A list of enquiries is kept to evidence information supplied and to whom | Anonymise after 1 year | No |
| | Volunteer & Work Experience Students details | Information is collected about volunteers and work experience student, this may include details of any medical conditions they may have | Destroy once volunteer has left or work experience has come to an end | No |

| Economic Development: Yeovil Innovation Centre (YIC) - Tourism | | | | |
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| | Tourism Database | Database of all business contact details including names, addresses, email addresses and websites Database used to email newsletter to businesses on the database | Database is kept current If someone withdraws consent, details are deleted | No |
| | Discover South Somerset Brochure & Discover Somerset Gardens Brochures | Yearly brochures produced to advertise businesses and Gardens in South Somerset | Database and brochure is kept current | No |
| | Discover South Somerset Website | Website to advertise businesses and events in South Somerset | Website is kept current | No |
| | Literature Exchange Event Documentation | Documentation to assist with the management and administration of the Literature Exchange Event | Registration Forms will be destroyed once the administrative use is concluded | No |
| Economic Development | | | | |
| | SSDC4Business Newsletter mailing list | A list of emails of those who have signed up for the SSDC4Business Newsletter | Contacts will be removed from the list if consent is withdrawn List is kept up to date | No |
| | General ED advice requests | Information relating to the request of Economic Development advice. | Emails kept as per Corporate Email Archive | No |

| Asset Number | Name of Asset | Function | Retention Period | Is the Data Legally Required to be Kept? |
|--|--|--|--|--|
| Environmental Health: Food and Safety | | | | |
| | RIDDOR Accident Reports | Reports of serious incidences at work that are reportable under RIDDOR as reported to the HSE Information received from the HSE | If report is for an adult then destroy 3 years from closure If report is for a child then destroy 25 years from closure | Yes |
| | Cooling Tower Notifications | Notification of a Cooling Tower or Towers on site | Destroy 2 years after registration lapses | Yes |
| | Food Registration Records | Information relating to the registration of Food Premise | Destroy 2 years after registration lapses | Yes |
| | Food Hygiene Inspection Records | Information relating to hygiene standards for food businesses | Destroy 6 years from date of inspection | No |
| | Infectious Disease Notifications | Reports of infectious diseases Information received from the PHE | Destroy 3 years for the last action | No |
| | Premises and TENs consultation records | Information relating to Premise applications and TENS application for the purpose of consultation | Destroy after 2 years | No |

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| | Acupuncture, Tattooing, Ear Piercing, Electrolysis & Special Treatments Registration Records | Information relating to the registration of Acupuncture, Tattooing, Ear Piercing, Electrolysis & Special Treatments premises | Record to be destroyed 2 years after registration has been surrendered/seized/forfeited/r evoked | No |
| | TB Notification | Information relating to an incident of a TB restriction Information received from the AHVLA | Destroy 3 years for the last action | No |
| | Health & Safety Inspection records | Information relating to the inspection of businesses for the purpose of Health & Safety | Destroy 6 years from date of inspection | No |
| Environmental Health: Food and Safety: Environmental Protection | | | | |
| | Service requests relating to noise | Information relating to the investigation of a noise complaint including information obtained using RIPA | Destroy 3 years from last action | Yes |
| | Service requests relating to pollution | Information relating to the investigation of a pollution complaint including odour; light pollution; drainage; waste; dust | Destroy 3 years from last action | No |
| | Services requests relating to burning | Information relating to the investigation of a bonfires, burning and smoke complaint | Destroy 3 years from last action | No |

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| | Services requests relating to filthy and verminous premises | Information relation to the investigation of filthy and verminous premises | Destroy 3 years from last action | No |
| | Service requests relating to "fly-tips" | Information relating to the investigation of a fly tip | Destroy 3 years from last action | No |
| | Public Health Funeral records | Information relating to handling of a Public Health funeral | Destroy 3 years from last action | No |
| | Service requests relating to water sampling | Information relating to the sampling and risk assessment of both private and public water sampling | Destroy 3 years from last action | No |
| | Air quality monitoring information | Information relating to the monitoring of air quality | Permanent - offer to archivist | No |
| | Contaminated land identification, investigation and remediation information | Information relating to the identification, investigation and remediation of contaminated land | Permanent - offer to archivist | No |
| | Licensing & Planning Consultations | Information relating to Premise applications, TENS applications and Planning applications for the purpose of consultation | Destroy after 2 years | No |
| | Pollution Prevention Control records | Information relating to the inspection of prescribed premises for the purpose of pollution control | Remove from public register 3 months post lapse of permit and destroy after 4 years post lapse of permit | No |
| | Enforcement files including fixed penalty notices, witness statements and interviews under caution | Information relation to investigation and enforcement of Environmental Protection statutory contraventions | Destroy 7 years from investigation complete | Yes |

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| | Service requests for pest control | Information relating to the request for the investigation and treatment of pests | Destroy 3 years from last action | No |
| Environmental Health: Food and Safety: Enforcement | | | | |
| | Service request for the collection of a stray dog | Information relating to the collection and ownership of a stray dog | Destroy 3 years from last action | No |
| | Service request for the investigation of a dangerous dog | Information relating to the investigation into a dangerous dog | Destroy 3 years from last action | No |
| | Service requests relating to the reporting and investigation of dog fouling | Information relating to the reporting and investigation of dog fouling | Destroy 3 years from last action | No |
| | Service requests relating to the reporting, investigation and destruction of abandoned vehicles | Information relating to the reporting, investigation and destruction of abandoned vehicles | Destroy 3 years from last action | No |
| | Service request relating to the reporting and investigation of littering offences | Information relating to the reporting and investigation of littering offences | Destroy 3 years from last action | No |
| | Service request relating to the reporting and investigation of fly posting | Information relating to the reporting and investigation of fly posting | Destroy 3 years from last action | No |

| Asset Number | Name of Asset | Function | Retention Period | Is the Data Legally Required to be Kept? |
|----------------|---|--|---|--|
| Finance | | | | |
| | General Ledger; Purchase Order Processing; Purchase Ledger; Accounts Receivable Documentation | The administration of payments to and from SSDC | Destroy 6 years after the conclusion of the transaction | Yes |
| | Business Intelligence Reports | Run reports from the information held within E5 Financial Management System for various purposes | Destroy when administrative use is concluded | No |
| | Statement of Accounts | Published finance position of SSDC | Permanent - offer to archivist | Yes |
| | Invoices | A record of all paid invoices | Destroy 6 years after the conclusion of the transaction | Yes |
| | Card payment system | Processes electronic debit and credit card payments Reports are run from the system to help daily reconciliation | Destroy 6 years after the conclusion of the transaction | Yes |
| | Axis Income Management (AIM) - Cash Receipting | Processes all payment transactions Reports are run from the system to help daily reconciliation | Destroy 6 years after the conclusion of the transaction | Yes |

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| | Coinage | Records payments from kiosks Reports are run from the system to help daily reconciliation | Destroy 6 years after the conclusion of the transaction | Yes |
| | Salary Information | Spreadsheets maintained to budget for and monitor salary budget | Destroy after next year's budget has been adopted | No |
| | Direct Debit instructions | Scanned copies of all Direct Debit instructions received from customers | Destroy 6 years after the conclusion of the transaction | Yes |
| | HMRC CIS Information | Information used to file Construction Industry Scheme returns to HMRC | Destroy 6 years after the conclusion of the transaction | Yes |
| | HMRC VAT Information | Information used to file VAT returns to HMRC | Permanent - offer to archivist | Yes |
| | Spike Cavell | Used to publish information of Council's spending over £500 and analysis and risk management | Destroy 6 years after the conclusion of the transaction | Yes |
| Insurance | | | | |
| | Claims records | Documentation relating to claims made against the Council or claims made by the Council | Destroy 7 years after all obligations and entitlement are concluded | Yes |
| | Insuring against loss <ul style="list-style-type: none"> Insurance policies Renewals | Documentation relating to insurance policies and renewal information | Destroy when administrative use is concluded | No |

| Asset Management | | | | |
|------------------|-------------------------------|---|--|-----|
| | Asset Register | Lists all assets for accounting purposes | Permanent - offer to archivist | Yes |
| | Property Booklet | Quick reference overview of all assets | Updated every two years | No |
| | Database of land and property | Electronic record of all land SSDC has ownership or responsibility for including reporting and reviewing assets | Permanent - offer to archivist Reports - destroy when administrative use is concluded | No |

| Asset Number | Name of Asset | Function | Retention Period | Is the Data Legally Required to be Kept? |
|-------------------------------------|---|--|------------------|--|
| Housing and Welfare: Welfare Advice | | | | |
| | Welfare Advice e.g. general benefit checks and 'what if' calculations | Information is gathered in order to provide accurate advice | 12 months | No |
| | General Casework e.g. form filling and benefit claims | Information is gathered in order to assist with clients' cases | 2 years | No |

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| | Appeals - 'debating a point of law' | Information is gathered to assist with preparation of appeal | 6 years | Yes |
| | Other client information e.g. names, addresses | Information is gathered to log cases for statistical purposes for committee reports and members and ongoing case management | 6 years | Yes |
| Housing and Welfare: Housing Finance | | | | |
| | Deposit Guarantee Scheme (DGS) Casework | Information to assess eligibility for the scheme, recouping the money and documentation for applications | 6 years from when guarantee has been recovered | Yes |
| | Housing Finance Spreadsheets | Assists with the financial management for the Housing Service | 6 Years | Yes |
| | Housing Benefit Schedules | Information is shared by the benefits team to list Housing Benefit payments made when acting Housing are acting as landlords | 6 Years | Yes |
| Housing and Welfare: Housing Advice | | | | |

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| | The registration of housing applications & the process for applying for housing within the Homefinder Somerset Scheme | Information gathered to assess eligibility for the Homefinder Scheme, bidding history and information which is considered by participating Housing Associations | When any 'active Homefinder Somerset' application reaches 6 years When any house cancelled or closed application reaches 2 years Documents that have been scanned on to the J Drive will be deleted from the drive once attached to the household's record on Abrisas | No but part of HomeFinder Somerset Partnership Agreement |
| | Sensitive Information File | Sensitive Information is sometimes sent by Social Services which could be relevant to housing applications, but is not appropriate to scan on to Abrisas, so is kept separately | Destroyed after administrative use is concluded | No |
| | CCTV used in Housing Advice Centre | To monitor the site to ensure the safety of the building and staff | Footage is overwritten every 30 days | No |
| | System User Information | Permissions and roles of all Abrisas users within the participating local Authorities and Housing Associations is on Abrisas, new starter forms submitted by SSDC officers, and a spreadsheet of current and ex ' SSDC officers are kept to monitor use of system | New started forms are deleted once user has left organisation Spreadsheet is updated to show that user has left and no longer has access to system as users can't be deleted from the Abrisas system | No |

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| | Housing Advice Administrative Spreadsheets e.g. banding appeals, MP letters, complaints & compliments | Information is recorded for statistical and monitoring purposes | The current year plus the previous year will be retained | No |
| | Visitor's Log | Information gathered to evidence number of people coming to the office; may include surname, reason for visit, any room used, and what was done | The current year plus the previous year will be retained | No |
| Housing and Welfare: Gypsy Sites | | | | |
| | Homefinder residents of gypsy sites | Keeps a running record of tenancy issues | When any 'active Homefinder Somerset' application reaches 6 years; When any house, cancelled or closed application reaches 2 years | No but part of HomeFinder Somerset Partnership Agreement |
| | Waiting list for Gypsy Land | To keep a running record of demand for pitches and then for allocation | 6 years | No |
| | Gypsy Tenancies Spreadsheet | For a quick summary of current residents and tenancy start dates Also to be used in conjunction with Word for mail merges | 6 years from end of tenancy | No |

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| | Gypsy Unauthorised Encampment | To monitor where sites are being used for unauthorised encampment | Paper file destroyed 12 months after unauthorised encampment Spreadsheet depersonalised 12 months after unauthorised encampment | No |
| Housing and Welfare: Homelessness Prevention | | | | |
| | Homelessness Applications | Information is collected in support of an application for support with homelessness prevention and temporary accommodation | When any 'active Homefinder Somerset' application reaches 6 years When any house, cancelled or closed application reaches 2 years Documents that have been scanned on to the J Drive will be deleted from the drive once attached to the household's record on Abritas | No but part of HomeFinder Somerset Partnership Agreement |
| | Sensitive Information File | Sensitive Information is sometimes sent from the Probation Service and minutes from MAPPA regarding sensitive information about individuals in the progress of making a homelessness application | Destroyed after administrative use is concluded | No |

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| | County Court Desk documents | Information is sent by landlords and mortgage providers when action for repossession is being taken against the individual(s) Those individuals are contacted offering advice and assistance with the repossession case | Information will be destroyed on Abritas as per it's retention policy Paper documents destroyed after administrative use is concluded | No |
| Housing and Welfare: Careline | | | | |
| | Client records (client's details e.g. name, address, DOB, medical and medication details, key safe information, emergency contacts, other relevant information such as dates of holidays, details of carers, do not resuscitate requests, all calls in and out - records telephone number, date and time of call and duration of call) | Information is collected about the clients to assist with response calls, home visits and the management of accounts e.g. invoices | Information is deleted from PNC once the contract has been cancelled and the machine returned Paperwork either contained in the lockable filing cabinets or scanned onto the J Drive are deleted 1 year after the contract has been cancelled | No |
| | Careline Administrative Documents: <ul style="list-style-type: none"> Stepping Stone Documentation Telecare Spreadsheet Referral book Stock book | Information is collated and recorded to help with the administration of Careline for management, monitoring and reporting purposes | Stepping Stone Documentation and Stock book destroyed after current year plus one year Referral book destroyed after 2 years Telecare Spreadsheet - records will be deleted a year after Careline contract has been cancelled | No |

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|------------------------|---|---|--|--|
| Human Resources | | | | |
| | Personal files: <ul style="list-style-type: none"> • Application Form • Eligibility to work documentation • DBS-related information • Job Description • Contract of Employment • Contract Variations • Disciplinary records • Grievances • Training record • Maternity/paternity records • Absence monitoring - return to work form; sickness reviews; Occupational Health reports • Termination documents • Emails • Mortgage/rent requests • References/Reference requests | Documents relating to individual's employment at SSDC | Exit interview documents; Documents relating to sickness (apart from anything related to serious illness, stress or work related accidents); Maternity documents (over 6 years old); duplicates of contracts and contract variations; Equal opportunities monitoring; E-Mails; Mortgage/rent requests etc to be destroyed 6 months after employment ceases Leavers from and tick list; Redundancy details; Sickness documents relating to serious illness, stress or work-related accidents; Maternity documents related to maternity within the last 6 years; Contracts and Contract Variations; Job Descriptions; Starter Forms and tick list; Application forms; Reference/Reference requests; Eligibility to work documentation to be destroyed 6 years after employment ceases | No |

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| | Discipline records | Documentation relating to the discipline of individuals | <p>Informal warning - removed from personal file after 4 months</p> <p>Formal verbal warning - removed from personal file after 6 months</p> <p>Written warning - removed from personal file after 12 months</p> <p>Final written warning - removed from personal file after 24 months</p> <p>Formal disciplinary proceedings will be retained for a total of two years before being destroyed</p> | Yes |
| | <p>Recruitment file:</p> <ul style="list-style-type: none"> • Recruitment authorisation form • Shortlist form • Weighting Sheet • Selection Day Programme • Application Forms • Correspondence | Documents relating to the recruitment process | Destroy 6 months after recruitment finalised | No |
| Payroll | | | | |
| | Pay records | Documents involved in the administration of remuneration to staff and members of the authority | Destroy 7 years after the conclusion of the transaction | Yes |

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| | Child Care Salary Sacrifice Scheme documents | Documents relating to the administration of the Child Care Salary Sacrifice Scheme | Destroy 7 years after the conclusion of the transaction | Yes |
| | Cycle Salary Sacrifice Scheme | Documents relating to the administration of the Cycle Salary Sacrifice Scheme | Destroy 7 years after the conclusion of the transaction | Yes |
| | Expenses records: <ul style="list-style-type: none"> • Claim forms • Receipts • MOT Certificates • Insurance Certificates • Driving Licence details | Documents involved in the administration of expenses paid to staff and members | MOT and Insurance Certificates; Driving licence details - destroy once new certificate is produced Destroy claim forms and receipts 7 years after the conclusion of the transaction | Yes |
| | Pension records | Documents involved in the administration of pension schemes for current and former employees | Destroy 6 years from last pension payment | No |
| | Car Loans records | Documents involved in the administration of car loans to staff | Destroy 7 years after the conclusion of the transaction | Yes |
| | Timesheets | Records of hours worked for overtime, stand-by and casual workers purposes | Destroy 7 years after the conclusion of the transaction | Yes |

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|--------------|---|---|---|--|
| ICT | | | | |
| | Staff and Member personal information relating to IT access | Stores staff names, Councillors names, phone numbers, email addresses for use with other systems Can include personal email and contact numbers for use with remote access system | Destroyed after administrative use is concluded | No |
| | Telephone Directory | Stores staff and some councillor contact names and phone numbers | Destroyed after administrative use is concluded | No |
| | IT Helpdesk Records | A log of all IT related calls to the IT Helpdesk and follow up tasks for the appropriate Officers This includes breach reporting and information associated with the breaches | Destroyed after administrative use is concluded | No |
| | Email archive system | Holds all archived emails | Currently not destroyed | Some emails will be required to be kept |
| | Email system | Holds all current emails | Currently not destroyed | Some emails will be required to be kept |
| | Secure Email system | Holds email that has been sent securely | Currently not destroyed | Some emails will be |

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| | | | | required to be kept |
| | Mobile Device Management System | Enables SSDC mobile devices to be managed remotely including location (when working across all devices) | Information is live, the system only allows the user to see the current data | No |
| | SharePoint | Enables staff to store project documents and information that may be shared as part of secure areas with third parties | Currently not destroyed | Some data will be required to be kept |
| | Yammer | Provides staff forums, for sale, hobbies pages, team pages and general information relating to the Council It is not intended to be used for personal or case information Could be used for third party access in the future | Currently not destroyed | No |
| | NETConsent Policy System | Delivers policies or documents or internet links (training) to staff who have a network login | Currently not destroyed | No |
| | Profile Unity | Stores user settings and configurations There is a small risk of personal or sensitive information being held in the system if a user saved a document to their desktop containing such The information is not accessible through the system | Destroyed after administrative use is concluded | No |
| | Microsoft Lync | Communication tool SSDC has decided not to record/store Instant Messages sent within the system | Information is live, the system only allows the user to see the current data | No |
| | Office 365 | Online access to Powerpoint, Word etc Office products Document sharing (in use only on a few logins) | Currently not destroyed | Some data will be required to be kept |

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| | OneDrive | Part of O365 | Currently not destroyed | Some data will be required to be kept |
| | Umbraco | Umbraco - Content management system for all SSDC websites (internal and external) | Destroyed after administrative use is concluded | No |
| | Webmap | Webmap (GIS) Mapping Information System showing addresses (no names) May contain historical antisocial behaviour info | Currently not destroyed | No |
| | Web Marshall | Web Marshall enables filtering of sites to protect staff and also the ability to run reports of internet activity on our SSDC network | | No |

| Asset Number | Name of Asset | Function | Retention Period | Is the Data Legally Required to be Kept? |
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| Legal services | | | | |
| | Debt Case Files | Information and records relating to the process of debt recovery | Where a CCJ has been issued - Destroy 6 years after last action | Yes |

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| | Contract Case Files | Information and documentation relating to contracts including ordinary contracts and contracts under seal | Ordinary contracts - Destroy 6 years after the term of the contract has expired Contracts under seal - Destroy 12 years after the term of the contract has expired | Yes |
| | Land/Property Case files including Deed Packets | Information and records relating to the process of land disposal and conveyancing and the making of easements and various other legal transactions undertaken on behalf of SSDC | Destroy 12 years from file closure | Yes |
| | Planning Agreement Files (s106 Agreements) | Information and records relating to the process of making a planning obligation or legal agreement made under s106 Town and Country Planning Act 1990 | Agreement Permanent Offer to Archivist; Other documentation 12 years from date of agreement | Yes |
| | Local Land Charges Register | Legal documentation relating to local land charges including searches and title investigation | Register is permanent record but individual entries can be removed on request after charge has been discharged | Yes |
| | Legal Advice | Providing advice to clients and services which are legally privileged relating to all aspects of the legal system | Destroy 2 years after matter is concluded | No |
| | Bylaws | Documentation relating to the process of making local laws | Bylaws - Permanent | Yes |

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| | Planning Enforcement Register | Legal documentation relating to planning enforcement notices | Register is permanent record but individual entries can be removed on request after enforcement notice has been complied with | Yes |
| | Contracts Database | Database of all contracts held by Legal Services | Register is kept up to date | No |
| | Statutory Notices | The process of enforcing building or land regulations | | No |
| | Housing Stock Transfer | Documentation relating to the transfer of the Council's housing stock | Permanent - Offer to Archivist | No |
| | Maps | Maps of the South Somerset District area | Permanent - Offer to Archivist | No |
| | Subject Access Requests Records | Information and records relating to processing of SARs | Destroy 2 years from conclusion of request | No |
| | Records relating to other DP searches <ul style="list-style-type: none"> • s29(3) requests • Domestic Homicide Reviews • Missing Person requests | Information and records relating to the processing of other DP requests | Destroy 2 years from conclusion of request | No |
| | Freedom of Information Records | Information and records relating to processing of FOI requests including internal reviews | Destroy 3 years after date of creation | No |
| | PIAs | Documentation relating to the undertaking of PIAs | Permanent - Offer to Archivist | No |

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| | Fraud Investigation Records | Records relating to the activities relating to the detection, prevention and prosecution of financial irregularity | Where case has gone for prosecution, destroy file 6 years after the conclusion of the transaction Where case does not go for prosecution destroy file | Yes/No |
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| Asset Number | Name of Asset | Function | Retention Period | Is the Data Legally Required to be Kept? |
|------------------|---------------|----------|------------------|--|
| Licensing | | | | |

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| | <p>Licensing Act 2003 Records:</p> <ul style="list-style-type: none"> • Premises Licences • Club Premises Licences • Temporary Event Notices • Personal Licences • Notification of Interest | <p>Information is processed for the purpose of granting, issuing and updating licences issued under the Licensing Act 2003 Information may also be used to prosecute licence holder where conditions of licence are not being met Records also contain details of inspections undertaken by Officers</p> | <p>Premises and Club Premises Licences: Record to be destroyed 2 years after licence has been surrendered Where representations for a licence has been received destroy 3 months from date of decision of committee If decision is taken to appeal destroy representations and case file 7 years after last action</p> <p>Personal Licences: Record to be destroyed 2 years after licence has been surrendered Where applicant has a relevant offence, remove details and all related information as soon as offence is spent Where application has been referred to a Committee to determine whether to grant a licence or not and the Committee reject application, destroy application 3 months from date of decision</p> <p>TEN: Record to be destroyed 2 years after event date or withdrawal of notice Where notice has been refused destroy once administrative use is concluded</p> <p>Notification of Interest: Destroy once notification has ended</p> | <p>Yes</p> |
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| | <p>Gambling Act 2005 Records:</p> <ul style="list-style-type: none"> • Premises Licence • Club gaming Permit • Club Machine Permit • Prize Gaming Permit • Family Entertainment Centre Gaming Machine Permit • Notification of two or less gaming machines • Occasional/ Temporary Use Notices • Small Society Lottery Registration | <p>Information is processed for the purpose of granting, issuing and updating licences, permits and registrations issued under the Gambling Act 2005 Information may also be used to prosecute licence holder where conditions of licence are not being met Records also contain details of inspections undertaken by officers</p> | <p>Record to be destroyed 2 years after licence/permit/registration has been surrendered/seized/forfeited/revoked</p> <p>Where Club Gaming Permit or Club Machine Permit has been cancelled by the LA, record must be kept for 10 years from cancellation and can then be destroyed</p> | Yes |
| | <p>Taxi Licensing Records:</p> <ul style="list-style-type: none"> • Hackney Carriage & Private Hire Driver's Licence • Hackney Carriage Vehicle Licence • Private Hire Vehicle Licence • Vehicle Trailer Licence • Private Hire Operator's Licence | <p>Information is processed for the purpose of granting, issuing and updating taxi licences Information may also be used for enforcement purposes</p> | <p>Record to be destroyed 2 years after licence has been Retention of non-granted licenses - destroy 21 days after refusal decision is taken unless appeal is lodged with the Magistrates' If Appeal is lodged retain until all appeal provisions have been exhausted</p> | Yes |
| | Street Trading Consent Records | <p>Information is processed for the purpose of granting, issuing and updating street trading consents Information may also be used for enforcement purposes</p> | <p>Record to be destroyed 2 years after permit has been surrendered/seized/forfeited/revoked</p> | No |
| | Acupuncture, Tattooing, Ear Piercing, | Information is processed for the | Record to be destroyed 2 | No |

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| | Electrolysis & Special Treatments Registration Records | purpose of granting, issuing and updating acupuncture, tattooing, ear piercing, electrolysis & special treatment registrations Information may also be used for enforcement purposes | years after registration has been surrendered/seized/forfeited/r evoked | |
| | Scrap Metal Licensing Records: <ul style="list-style-type: none"> Collectors Licence Site Licence | Information is processed for the purpose of granting, issuing and updating scrap metal licences Information may also be used for enforcement purposes | Record to be destroyed 2 years after licence has been surrendered/seized/forfeited/r evoked | No |

| Asset Number | Name of Asset | Function | Retention Period | Is the Data Legally Required to be Kept? |
|------------------------|---------------|----------|------------------|--|
| Locality | | | | |
| Currently under review | | | | |

| Asset Number | Name of Asset | Function | Retention Period | Is the Data Legally Required to be Kept? |
|--------------------------------|---------------|----------|------------------|--|
| Octagon & Westlands | | | | |

Currently under review

| Asset Number | Name of Asset | Function | Retention Period | Is the Data Legally Required to be Kept? |
|--------------------|----------------------------------|---|--|--|
| Performance | | | | |
| | Performance Monitoring Reporting | Information is collected to check against the Council's Performance Indicators | TEN - 1 year Documents on hard drive Permanent Offer to Archivist | No |
| | Online survey tool | Account is available to staff who wish to obtain information (personal and non-personal data) from internal and external stakeholders in the form of an online survey | Public consultation - 5 years if development of significant policies and 1 year if development of minor policies | No |
| | Lean Activity Logs & Reports | Information was collected as part of project to improve service efficiency | Delete once purpose of programme is complete | No |
| | Performance Finance Documents | Assists with the financial management of the Performance Team | 6 years | No |

| Asset Number | Name of Asset | Function | Retention Period | Is the Data Legally Required to |
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| | | | | be Kept? |
| Planning | | | | |
| Currently under review | | | | |

| Asset Number | Name of Asset | Function | Retention Period | Is the Data Legally Required to be Kept? |
|--------------------|---|--|--|--|
| Procurement | | | | |
| | Returned cheques | When cheques have been issued and returned these are stored until instructed by services as to what should be done | Cheques destroyed after 1 month (Council Tax as an exception) Paperwork relating to cheques destroyed after 18 months | No |
| | Management of contracts: <ul style="list-style-type: none"> • MFDs • Stationary • Print Management • Mobile Phones • Fixed Lines | Information such as Invoices, invoice queries, orders and contract used to manage the contract | Destroy 6 years after the term of the contract has expired | Yes |
| | Contract Register | Register of all contracts | Updated as necessary | No |
| | Procurement Cards documentation | Applying and setting up cards, monitoring spend, card numbers | Destroy 6 years after the conclusion of the transaction | Yes |

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| | Corporate Risk Register | Details of the different risks and what actions can be taken to mitigate these risks | Held indefinitely | No |
| | Recharge systems | Various systems used to monitor device usage for recharge purposes | Held indefinitely | No |
| | MFDs | Documents that are scanned and/or copied are stored on the MFDs hard drive | Hard drives are industrially wiped at the end of contract | No |

| Asset Number | Name of Asset | Function | Retention Period | Is the Data Legally Required to be Kept? |
|--|---------------|----------|------------------|--|
| Property Services and Engineering | | | | |
| Currently under review | | | | |

| Asset Number | Name of Asset | Function | Retention Period | Is the Data Legally Required to be Kept? |
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| Revenue and Benefits | | | | |
|----------------------|--|--|------------------------|--|
| | System for calculating and administering housing and council tax benefit | Information is gathered and processed in relation to benefit calculations and the administration of such benefits | Currently under review | |
| | System for the recovery of Council Tax | Information is processed in relation to the recovery of Council Tax | Currently under review | |
| | System for the recovery of Business Rates | Information is processed in relation to the recovery of Business Rates | Currently under review | |
| | System reporting | Reports are run from the iWorld/Northgate systems for monitoring purposes | Currently under review | |
| | Benefit information | Screen shots are taken from the Customer Information System (CIS) and saved within the EDM CIS is a DWP system and only permitted to look, not to change | Currently under review | |
| | Discretionary Hardship/ Housing payment administrative spreadsheets | Information monitoring the issue of payments and the write-offs | Currently under review | |
| | Universal Credit and Single Fraud Investigation Service information spreadsheets | | Currently under review | |

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| | Credit reference documentation | Information is obtained to assist with the recovery of overpayments and the tracing of debts | Currently under review | |
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| Asset Number | Name of Asset | Function | Retention Period | Is the Data Legally Required to be Kept? |
|--------------------------|---------------|----------|------------------|--|
| Strategic housing | | | | |
| Currently under review | | | | |

| Asset Number | Name of Asset | Function | Retention Period | Is the Data Legally Required to be Kept? |
|--------------------|---|---|--|--|
| Streetscene | | | | |
| | Records of operational requests and complaints including: <ul style="list-style-type: none"> • Flytipping • Horticulture • Street Cleaning • Car park staffing related issues • Taxi Testing • Fleet-related complaints | Names, addresses and contact details are collected from those reporting an incident or making a request in order to process that request Information about the 'culprit' may also be collected where action may be taken against that individual e.g. flytipping | Records will be kept for current year plus one additional year | No |
| | Contract details | Details of contracts where SSDC are the contractors and some details of contractors which SSDC may be used | See Legal's IAR for full contract retention periods Where not covered by the retention periods information will be kept and destroyed after administrative use is concluded | Yes |
| | Nursery customer details | Details of customers of the nursery used in relation to orders made only and not for direct marketing purposes | Destroyed after administrative use is concluded | No |
| | Parish Warden details | Details are kept for the Parish Warden Scheme where | Destroyed after administrative use is | No |

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| | | environmental schemes and issues can be discussed between Parishes and Streetscene. | concluded Information will be kept as current so warden's details to be deleted once replaced | |
| | Vehicle Tracking Information | This information is used to track vehicle i.e. to see where the vehicle has been, where it is going and where it is currently The information is also used to monitor drivers for speeding, breaking and erratic driving The information can be viewed in real time or be accessed at a later date | The system holds the tracking information for 3 months | No |
| | Yeovil Cemetery Records: <ul style="list-style-type: none"> • Plots and ownership ledgers • YDH Foetal Remains information • Mapping and Site information | This information is used in the process of managing the Cemetery | Permanent - Information is archived for historical purposes | No |
| | Staff HR Files | Information is a duplicate of the information held at Brympton Way to resolve HR issues without having to get HR file from Brympton | See HR's IAR for full HR retention periods | No |
| | Sickness Database | Details of when an individual is off work due to sickness This information is processed for the purpose of managing individual's sickness | See HR's IAR for full HR retention periods | No |
| | Sandbag List | Names and addresses of all the premises where sandbags have been delivered for flood prevention These details are stored to assist | Destroyed after administrative use is concluded | No |

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| | | with the management and strategy when an area is effected by flooding | | |
| Fleet Management | | | | |
| | Vehicle lease and purchase records | Details of the acquisition and disposal of vehicles through lease or purchase | Records to be destroyed 7 years after the disposal of the vehicle | Yes |
| | Vehicle allocation and maintenance records | Information about the day-to-day maintenance of vehicles including MOTs, defect reports, work sheets and servicing history | Destroy 15 months after the maintenance work has been completed | Yes |
| | Taxi Testing Documentation | Booking information for taxi vehicle compliance testing | Destroy 15 months after the maintenance work has been completed | Yes |
| | Vehicle tenders and contracts | Details of the process involved in tendering for a vehicle and/ or a contract | Ordinary Contracts – Destroy 6 years after the disposal of the vehicle Contracts Under Seal – Destroy 12 years after the disposal of the vehicle | Yes |
| | Driver's details: <ul style="list-style-type: none"> Record of driver's hours Driving licence checks Staff training | Information is recorded and retained to ensure compliance with driving regulations | Records of driving hours - destroy 12 months after the date of reading Driving licence checks - destroy after 6 months when a new check will be undertaken Training records - destroy 6 years after termination of employment | Yes |